



# Engagement & Loyalty

## Build Deeper Relationships With Exceptional Branded Experiences

Zinnia **Engagement & Loyalty** is the leading SaaS engagement product in the insurance market. It educates and motivates customers to improve their financial, physical, and emotional well-being while driving key metrics: **Engagement, Persistency, Cross/Up Sell, Lead Generation, and Net Promoter Score.**



More Personalization. More Insight. More Engagement.

## ABOUT ZINNIA

A New Tech Company,  
But Not New to Insurance

Zinnia brings together the expertise of insurance professionals and the vision of innovators from technology and data science.

As a team, we've built Zinnia Open Insurance to simplify the complex, get products to market faster, serve the customer better, and turn data and insight into better risk-based outcomes for everyone.

The result is exceptional experiences that can adapt, evolve, and grow right along with the marketplace.

# zinnia Engagement & Loyalty

## Deliver Enjoyable and Educational Experiences

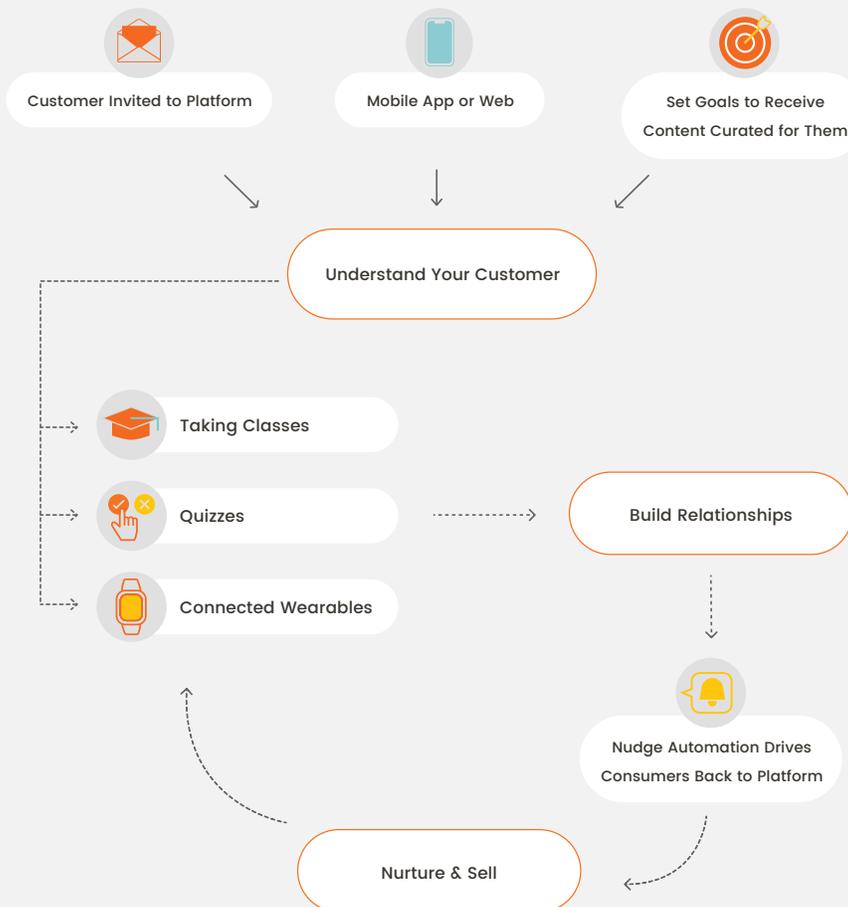
Informed by behavioral science and positive psychology, Zinnia Engagement & Loyalty empowers carriers to create a branded, highly-appealing gamified customer experience that engages with classes, quizzes, and tests while earning points in the rewards program.

## Transform Relationships through Deeper Insights

On-going customer engagement with relevant content provides zero-party and first-party data. Actionable insights improve persistency, uncover leads, and provide solutions to unmet needs throughout the customer's lifetime.

## Keep in Touch Automatically

Customer interactions with the branded platform trigger customized email and push notifications encouraging them to return and continue their journey, creating deeper relationships and loyalty with carriers.



*Zinnia Engagement & Loyalty deepens the relationship between carriers and customers, builds brand awareness, and grows business.*

# More Personalization. More Insight. More Engagement.

---

## EDUCATE

### Classes

Covering personal finance, health, fitness and emotional well-being as well as life events.

### Quizzes

Classes include quizzes that reinforce content and provide reward points.

### Quick Reads

Short articles to quickly engage customers.

### Extra Credit

Targeted question sets quickly reveal deep customer insights and drive engagement. Custom question sets available.

---

## ENGAGE

### Nudge Automation

Well-placed emails and push notifications invite voluntary participation and entice users to consistently return to the platform (i.e., start/complete a class, connect a wearable, check out a new feature, etc.).

### Lead Generation

Generate real-time leads from customers asking for additional support and information.

### Gamification

Gamified experience with personalized Avatar drives voluntary engagement through interaction with content, quizzes, extra credit, connected wearables and rewards.

---

## REWARDS

### Points Economy

Users earn points through participation in classes, quick reads, quizzes, extra credit, tasks and connected wearables. Points can be used for a chance to redeem gift card drawings, travel & affiliate promotions.

### Gift Cards

Completely turnkey system to manage, track and distribute gift cards.

## DATA

### Data Dashboard

Capture analytics on users' uncovered interests and goals that you can use to create ongoing interactions and actionable insights.

---

## CONFIGURATION

### Branding

White label platform with logo and brand colors.

### Onboarding

Onboard users via email eligibility file or single sign-on integration.

### Content

Configure content library. Custom content available as add on.

### Translation

Content can be translated and localized for specific needs and geographic regions.



 zinnia™  
Life, More Open.